

Experience
the
Power
of smart
Investing



W Accurate
Wealth

“
Wealth
Management
that revolves
around
you
”



W Accurate Wealth

Accurate Wealth is a leading wealth management company that has been providing financial advice to clients from last 8 years. With a client base of over 350 individuals and businesses across India and across the globe, the company has established itself as a trusted and reliable provider of financial services

Accurate Wealth offers a wide range of financial products and services including mutual funds, fixed income products, life insurance, general insurance, bonds, corporate fixed deposits, national pension scheme, demat account services, portfolio management services, and alternative investment funds.

At the core of Accurate Wealth's success is its expertise in retirement planning, risk profiling, and financial planning. The company's dedicated team of professionals has years of experience and in-depth knowledge of the financial markets, which enables them to provide customized financial solutions that are tailored to each client's specific needs and goals.

In conclusion, Accurate Wealth is a comprehensive wealth management company that is dedicated to helping its clients achieve financial security and stability through expert advice and personalized financial solutions.

Partnering with you on the path to financial success



Meet the founder

Ladies and Gentlemen, hold onto your wallets, we're about to introduce you to the mastermind behind Accurate Wealth, Dr. Yash Bhatt. With a Ph.D. and MBA in financial services, this man knows his way around the finance world. But, it's not just his expertise that sets him apart. Our founder is a master of one-to-one human interaction, able to connect with each and every client to understand their life goals and provide the best wealth management solutions.

Dr. Yash Bhatt has been an integral part of SJPI NICM Gandhinagar for the past 10 years, serving as an Assistant Professor specializing in finance, as well as fulfilling roles as a training and placement officer and an admission counselor. In addition to his work at SJPI NICM, he has also taught financial services and financial planning subjects at PDEU for 3 years."

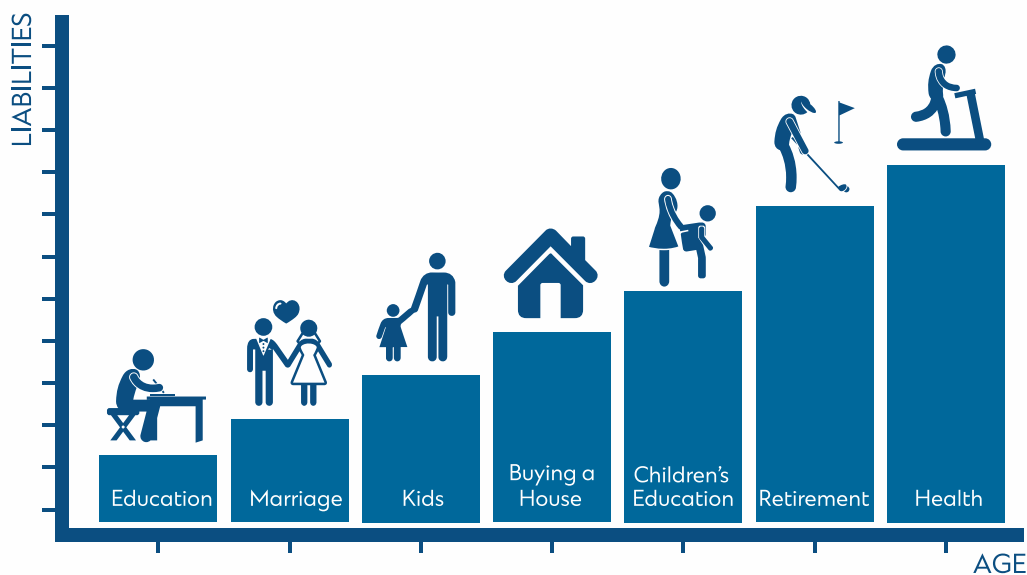
Dr. Bhatt has been spreading his financial wisdom for over a decade, educating people through investment training sessions and, of course, through Accurate Wealth. His mantra for his clients is very simple: "Invest in mutual funds, buy a term insurance policy, and diversify your portfolio."

For the past 8 years, Dr. Bhatt and Accurate Wealth have been serving clients with an educational approach, putting the customer first and foremost. So, when it comes to managing your wealth, you can trust that you're in the best hands. So, sit back, grab a slice of pizza (or a you're complicated wealth goals , whichever you prefer), and get ready to learn about the man behind the magic at Accurate Wealth.

PS : Let Your Money Smile !

Why financial planning?

As life progresses, your financial responsibilities increase.



We understand the importance of a well-rounded financial strategy, which is why we have a wide range of services that cater to every financial need. Whether you're looking for investment options, insurance coverage, or advice on how to manage your wealth, we have got you covered.

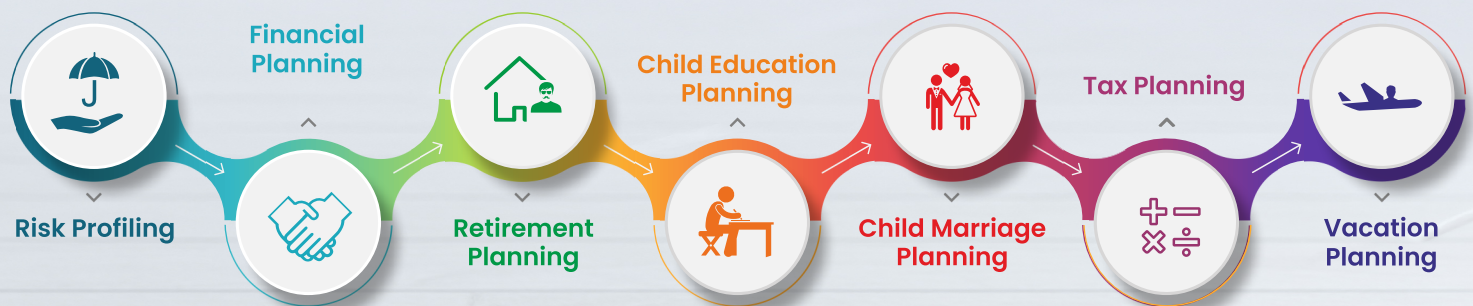
Product & Services

Accurate Wealth is proud to offer a comprehensive range of financial services products to its clients. Our goal is to ensure that our clients are well-equipped to make informed decisions and reach their financial goals. Here's a list of the services we offer:

Products



Services



Our Expertise

As a result of our dedication and hard work, we have been able to manage a whopping 25 crore of assets under management (AUM) for our clients.

Our diverse portfolio includes mutual funds, bonds, and other assets that are carefully selected to provide the best returns to our clients.

350 +
Clients across India

25+ Crore
under management



Systematic Investment Plans



SIP, or Systematic Investment Plan, is a powerful tool that can help you achieve your life goals. Whether you're saving for a down payment on a house, funding your child's education, or planning for retirement, SIP can help you reach your goals over time.

Remember, achieving your life goals with SIP requires patience and discipline. Stick to your investment plan and resist the urge to make impulsive investment decisions. With a sound investment strategy and a long-term perspective, you can use SIP to achieve your dreams and build a brighter financial future.

Life Goals



Emergency
Funding



Child Education
Planning



Child Wedding
Planning



Retirement
Planning



Vacation
Planning

SIP Amount	Expected Return	No. of Years	Final Amount
₹ 15,000	12 %	10	₹ 34,85,086
₹ 15,000	12 %	15	₹ 75,68,640
₹ 15,000	12 %	20	₹ 1,49,87,219

Looking for

Monthly Income?

Invest in FD

Mutual Funds



Through SWP

What is SWP ?

Systematic Withdrawal Plan (SWP) is a relatively new concept in India, where mutual funds offer investors the option of making monthly or quarterly withdrawals. In the same way that a Systematic Investment Plan (SIP) allows investors to invest a pre-determined amount on a regular basis, a Systematic Withdrawal Plan (SWP) allows investors to withdraw a pre-determined amount from the scheme in which they have invested on a regular basis.

Investment in FD	Investment in MUTUAL FUND
Monthly Income ✓	Monthly Income ✓
Chances of Capital Appreciation ✗	Chances of Capital Appreciation ✓
Tax Efficient Income ✗	Tax Efficient Income ✓



The Importance of Insurance

Why Should You Insure Everything?

Eye-opening facts show that only a small fraction of people have insurance coverage of their life, health, vehicles and their most beautiful homes.

So, what are you waiting for?

Get Covered Now!

Take a look at the table below to learn more.



Type of insurance	% People covered in India
Life Insurance	25 %
Health Insurance / Medidclaim	35 %
Home Insurance	Only 1 %
Two Wheeler Insurance	40 %

Types of Insurance Services provided by us.

- Term Plan Insurance
- Family Health Insurance
- Corporate Health Insurance
- Car Insurance
- Commercial Vehicle Insurance
- Third Party Insurance
- Travel Insurance
- Home Insurance
- Fire & Engineering Insurance
- Marine Insurance
- Cyber Shield Insurance



Life is Big.
Let's Plan for it.

“

Your financial success
is our top priority.

”

Let us help you achieve your dreams and
build a brighter financial future.

W Accurate
Wealth

A 407 - Shilp Aaron , Sindhu Bhavan Marg ,
Opp Armieda Complex , Ahmedabad-380054

+91 9925450350
info@accuratewealthadvisors.com
www.accuratewealthadvisors.com

Scan for Website

